

2013 PRISM Conference – Orlando

May 11-14, 2014

David Swenson

Conference Summary Report

I would like to express my continued appreciation to the Board for its approval of my attendance at PRISM (Public Retirement Information Systems Managers) conference. This was my fourth opportunity to attend as an employee of MPERA and sixth overall (twice with TRS). It's always very informative and a great opportunity to network with our IT peers from other public pension systems.

The annual PRISM Conference has always been a member focused conference where members share their knowledge and experiences with conference attendees in breakout presentations and panel group discussions. This year I volunteered to present one of these sessions. The topic of my presentation centered around our imaging project focusing mainly on the back-file scanning piece. My intention was to make it more of an interactive discussion among all present rather than a lecture type setting. I believe I accomplished that goal. The feedback I heard after was positive and the presentation was received well. I have attached a copy of the 'Speaker Bio' sent to the PRISM association that provides a summary of the presentation.

When not presenting, I was able to attend several other breakout sessions. The first was titled "Retiring Legacy Applications" presented by the State of Washington's Retirement Systems. The title intrigued me as MPERA is in the midst of such a project. Their focus in the presentation centered around their use of a Business Process Management System (BPMS) in order to efficiently modernize their systems. It was not unlike the Business Process evaluation MPERA went through a few years ago in preparation of our LOB replacement.

Another session by Texas County and District Retirement Systems (TCDRS) titled Innovative Evolution of TCDRS Disaster Recovery was more technical in nature and highlighted their progression to more efficient and timely backups and better disaster recovery preparation. It is always good information to see how others are prepared in this arena.

Illinois State Universities Retirement System (SURS) had a dual presentation. The first half focused on their migration from a static web site to one powered by a Content Management System (CMS). This was particularly pertinent to MPERA as we too are migrating to a CMS as part of making the MPERA website compliant with the new MT.GOV theme. The second half of their presentation, SURS discussed their new member self-service transactions which help eliminate paper forms and processing.

The last session I attended was presented by Colorado PERA and they presented on Desktop and Laptop virtualization. This was again a technical discussion, but very informative, outlining the benefits (and trials) of virtualizing the desktop environment. This is a technology that I believe MPERA can benefit from as well and can someday hopefully move toward.

PRISM has always been a great venue for sharing information and ideas with our IT peers and this year was certainly no exception. It was particularly gratifying to be able to 'give back' as a presenter.

My thanks again to the board for this opportunity.

Speaker Biography

Imaging and Back-file Conversion

Tuesday, May 13

9:00 am – 10:15 am and 10:30 am – 11:45 am

David Swenson

IT Systems Supervisor

Montana Public Employee Retirement Administration

Dave has served as the IT Systems Supervisor since 2010 where he is primarily responsible for the IT infrastructure/operations functions at MPERA. This included serving as project manager for MPERA's electronic content management (ECM) back-file project. Prior to that, his experience includes serving as the IT manager at Montana Teachers' Retirement system from 2002 to 2005, a contracted systems analyst, network manager at BDM (now Northrup-Grumman), IT Manager at both the Montana State Auditor's Office and Montana State Fund (Workers' Comp.) and at one time knew how to program in COBOL (on a Wang VS100!) and owned and operated a local computer sales and service shop in Helena. Starting in 2010, Dave has also been teaching 1 to 2 classes a semester as an adjunct CS professor at Carroll College. This is Dave's sixth PRISM conference but first time presenting. He holds a B.A. in Economics and minor in Computer Science from Carroll College in Helena.

Session Description

MPERA is in the midst of an agency-wide plan to modernize its business processes. The MPERAtiv program is comprised of multiple projects, including business process modification, data cleansing, imaging, and a new Line of Business (LOB) information

system. MPERA made the decision to implement the ECM system ahead of the Public Employee Retirement Information System (PERIS) LOB project as a standalone system then integrate it with PERIS as a part of that project.

Once the document imaging system/infrastructure was installed, the ECM project was primarily two-fold: Scan all incoming mail (day-forward) and scan all existing members' folders (back-file). This session will discuss our ECM project in general, but will primarily focus on the back file project; its trials, tribulations, successes, lessons learned and plans moving forward.

While ECM implementation projects among PRISM member agencies are nothing new, we hope sharing our experiences will foster discussion among attendees from which we can all benefit. Our desire is to make this an interactive discussion, not a lecture. We encourage other systems to share their experiences and suggestions as we move forward.